Chapter 12. Reports

Reports - General Information/Descriptions

In order to obtain reports from ARIS, from the Research Documentation screen, click on "Reports" on the toolbar and a listing of the possible reports will be displayed. All report options have been consolidated into this one location. Click on the appropriate report and your options will be displayed. Some reports will be "canned" reports, where you simply view and/or print. Other reports will require querying the system to create the user specific report. A description of each option under the reports heading is listed below.
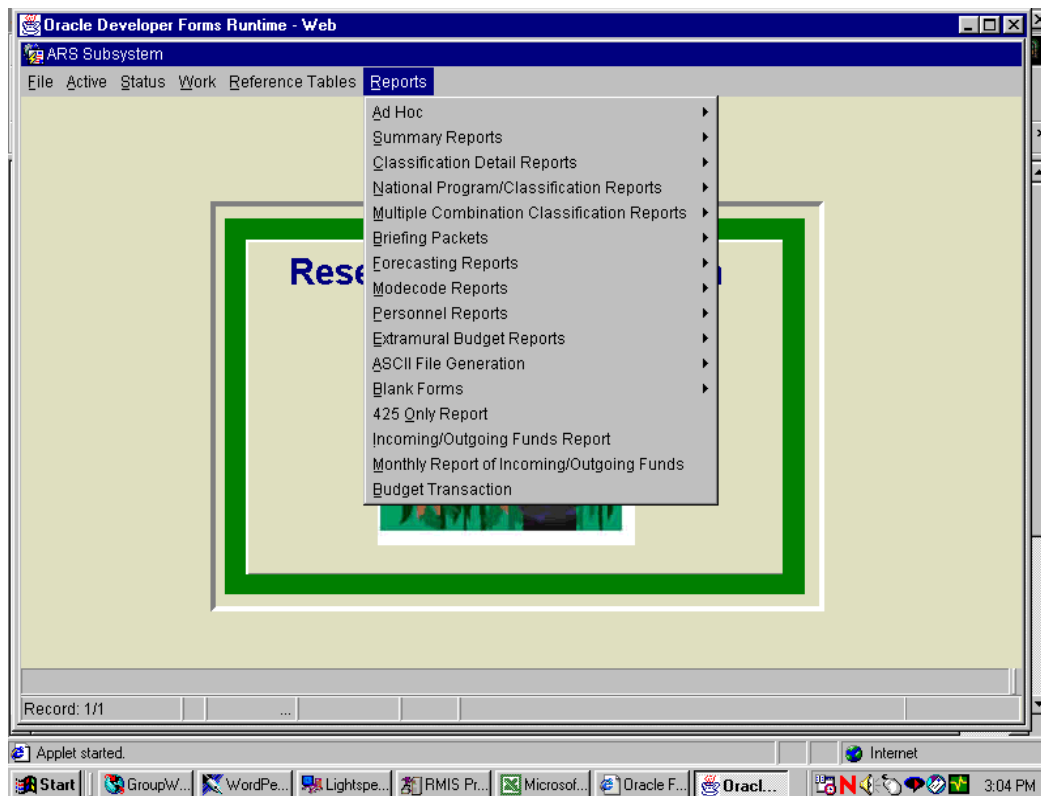

Report Names	Description
Ad hoc	Ad hoc reports allow the user to search and retrieve data from ARIS with customized query capabilities. Searching is available for text fields, code fields, dollar value fields and percentage fields. (Similar to Active Retrievals in RMIS, but with much more capability)

Summary Reports	These are "canned" reports. No querying is available. Options include: By Agency or Locations within - SOI, Activity, Special, and STP; By Location: SOI, Activity or Special; Responsibility: Various summaries by ADA or NPL.
Classification Detail Reports	Allows the user to search and retrieve data based on their specific needs. Options include: Mode code/Project No., Strategic Plan, Subject of Investigation, Subactivity, Special Classification, Codes within Strategic Plan, and Special within Special (not available yet). (Similar to Detail Reports in RMIS).
National Program/ Classification Reports	Allows the user to search and retrieve data based on National Programs. Options include: National Programs, SOI w/in National Program, Activity w/in National Program, Special w/in National Program, and REE w/in National Program.
Multiple Combination Classification Reports	Allows the user to search and retrieve data with a combination of two, three or four coding combinations.
Briefing Packets	Allows the user to print out information for the Agency, Location, Center or Management Unit. No searching is available. The user selects what is to be included in the packet and runs the report.
Forecasting Reports	Not available at this time. When available, table will be updated.
Modecode Reports	Not available at this time. When available, table will be updated.
Personnel Reports	Not available at this time. When available, table will be updated.
Extramural Budget Reports	Not available at this time. When available, table will be updated.
ASCII File Generation	For Salary Lapse and ARMPS use only.
Blank Forms	To print blank forms for data entry. See Chapter 4E.
425 Only Report	Not available at this time. When available, table will be updated.
Incoming/Outgoing Funds Report	Not available at this time. When available, table will be updated.
Monthly Report of Incoming/Outgoing Funds	Not available at this time. When available, table will be updated.
Budget Transactions	Not available at this time. When available, table will be updated.

Classification Detail Reports

Classification Detail Reports allows the user to search and retrieve data based on their specific needs.

In order to obtain a report by Subject of Investigation, one option is to go to Classification Detail Reports, under the Reports option on the toolbar (fig. 1). **NOTE:** There is usually more than one way to search and retrieve data from ARIS.

(Fig. 1)
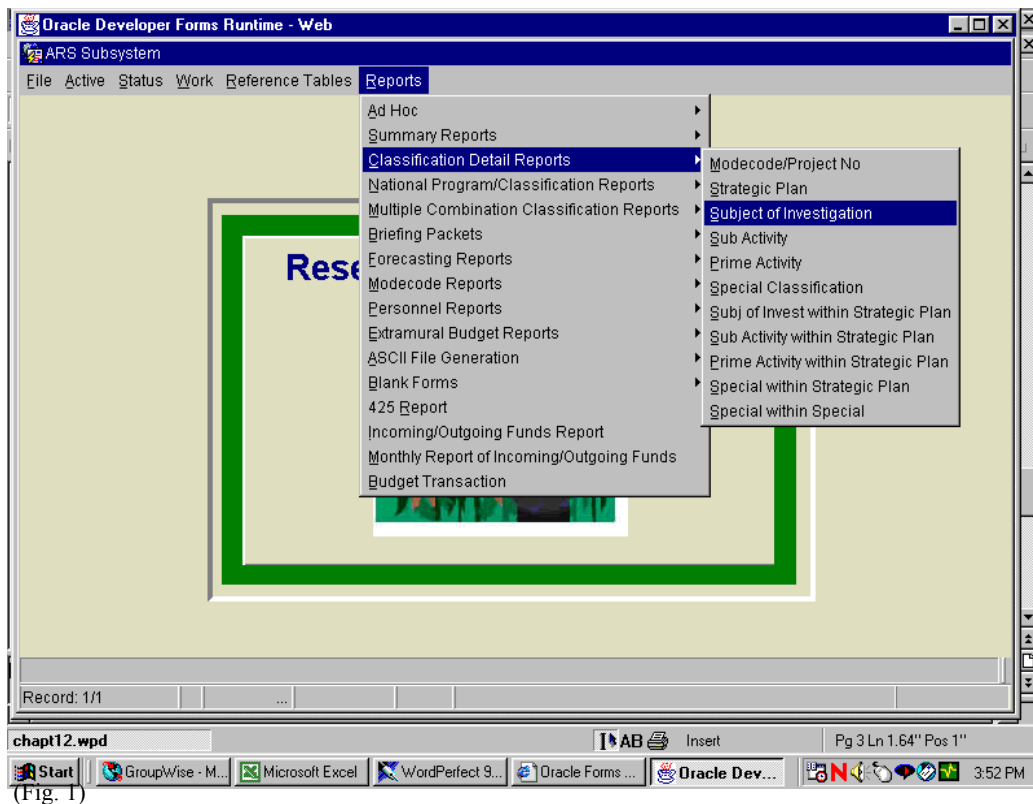
The query screen will be displayed (fig. 2). If unsure of the SOI code, click on the "?" to see a listing of all possible SOI codes (ex. Searching for *papaya*) (fig.2). Highlight the desired code and click on OK. The code will be inserted in the search screen. Add any other search criteria desired. (ex. Searching inhouse "D" projects, "A" active, in mode code 53 [PWA]) (fig. 3).

(Fig. 2)

(Fig. 3)

Click on the Execute Query icon and a listing of all the projects that meet the search criteria will be displayed (fig. 4).

(Fig. 4)

From the listing displayed, options include printing reports, viewing project information, or going to the 416 and viewing and/or printing the 416/417 information.

To print a project listing, click on "Reports" on the toolbar and the options will be displayed which include: create a report, create a report w/objective, create a report w/approach, or create a report with objective and approach. Click on the appropriate option and Adobe Acrobat will automatically display the report. To print, click on the Printer icon.

To view project information, click on the Proj Info. tab (fig. 5).

(Fig. 5)

Information such as title, project and accession number, date last modified, mode code, and associated dollars will be displayed on this screen. In order to see the next project in the project listing, click on the arrows on the toolbar and the system will bring you to the next project without having to go back to the listing. If this information is desired in hard copy, a print screen can be obtained by clicking on "File" and then "Print."

In order to go to the actual 416/417, highlight the project you would like to see from the listing, and then click on "Forms" and then "416" (fig. 6). Another listing will be displayed, along with all of the "tabs" to see the different pieces of the 416/417. Once viewing is complete, click on the Exit icon to go back to the original project listing.

Agricultural Research Information System (ARIS) - Detail Reports

File Edit Action Record Forms Reports Help

416 Data

ARIS

Subject of Investigation Report

Proj Listing | Proj Info

☐ AREAWIDE INTEGRATED PEST MANAGEMENT OF FRUIT FLIESIN
HAWAIIAN FRUITS AND VEGETABLES

| Comm Cd | 1030 | 010 % |

Comm Dol [$0]

Project 0500 00044 007 00 D   **Status** A   **SY** 0000.00   Net to Loc [$0]

STP(s) 2 2 4 100 %   0 0 0 0   000 %   **Start Date** 03/01/2000

City HILO   **Modecode** 53 20 03 35   **Term Date** 02/28/2005

000   VARGAS   ROGER   I

☐ MOLECULAR PHYSIOLOGY APPROACHES FOR THE
IMPROVEMENT OF TROPICAL CROPS

Comm Cd 1030 050 %

Comm Dol $671,163

Project 5320 21000 006 00 D   **Status** A   **SY** 0002.00   **Net to Loc** $1,342,325

STP(s) 2 1 2 3 060 %   2 1 2 2   040 %   **Start Date** 12/23/1997

City HILO   **Modecode** 53 20 03 35   **Term Date** 12/22/2002

001   MOORE   PAUL   H

Record: 2/4   <OSC>

chapt12.wpd   ⅠAB   Insert   Pg 6 Ln 6.51" Pos 3.17"

Start | GroupWise... | Microsoft E... | WordPerfe... | Oracle For... | Oracle ...   4:15 PM

(Fig. 6)

Ad Hoc Query

The Ad Hoc query option in ARIS allows users to search and retrieve data from ARIS with specific query capabilities. This option is similar to the Active Retrieval in RMIS but has many more capabilities and options.

From the Research Documentation screen, click on "Reports," "Ad Hoc," and "Research Documentation (416, 425, 550) (fig. 1).
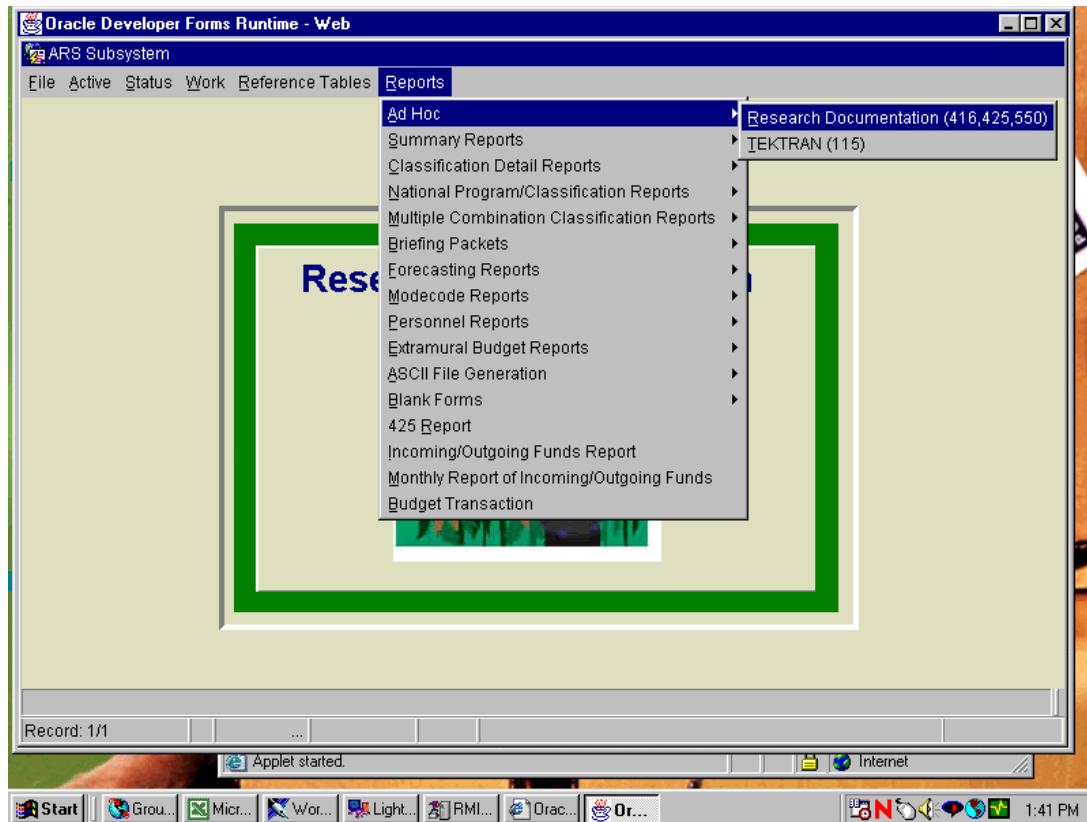

(Fig. 1)

A query screen will be displayed (fig. 2). This is a much different query screen than the other queries within ARIS. You will see on the lefthand side, a listing of main categories to search by: Project Information, 417 Codes, 115 Request for Manuscript, Annual Progress Reports, 425 Outside Funds Request, and 550 Extramural Agreements. Each main category has subcategories to search under. These are displayed by clicking on the "+" next to the category. For example, by clicking on the "+" next to the 417 codes, the following options are displayed: Sub-activity; Subject of investigation (SOI), Prime class; or Special. (fig. 3).
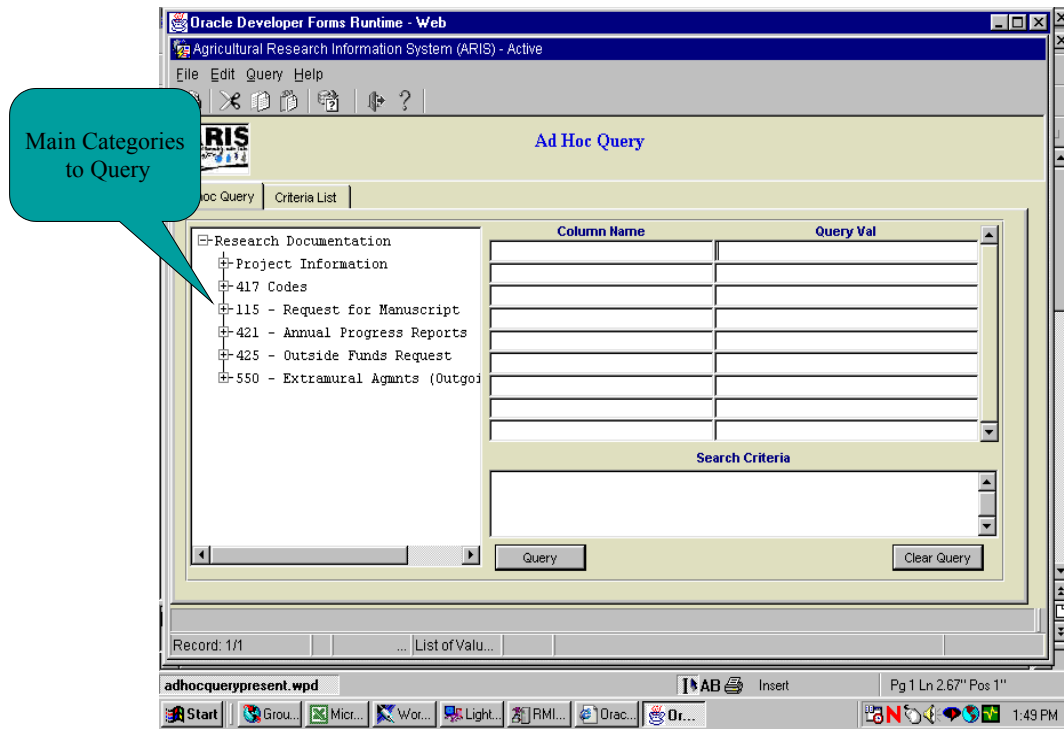
(Fig. 2)
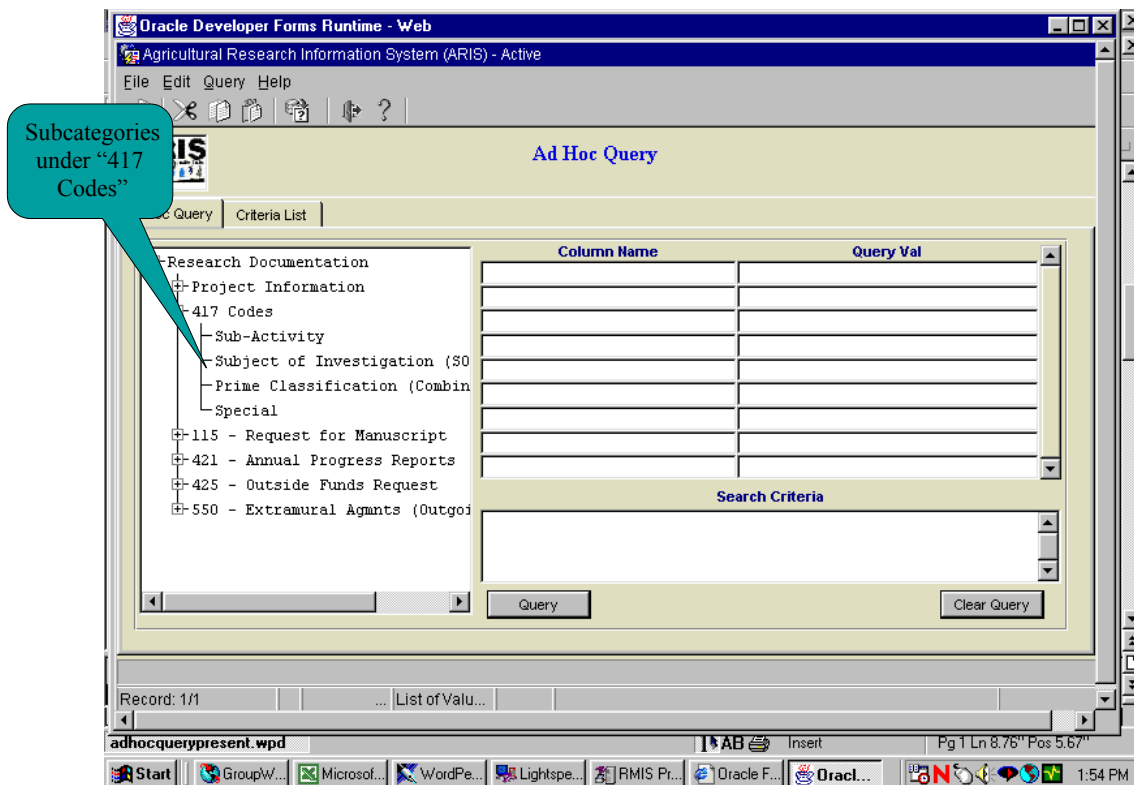
(Fig. 3)

By clicking on any of the subcategory options, the listing of all possible query options will be listed in the boxes to the right under Column Name. For example, if you click on SOI, under column name, SOI code(s) and Percent % will be displayed (fig. 4). These are the two options for searching under SOI.

(Fig. 4)

By clicking on the Project Information Category, you get all the basic project information subcategories to query by (fig. 5). When you click on the actual category names under the subcategories, the query options will be displayed in the "Column Name" section (fig. 6)

(Fig. 5)

(Fig. 6)

(Fig. 7)   Example:
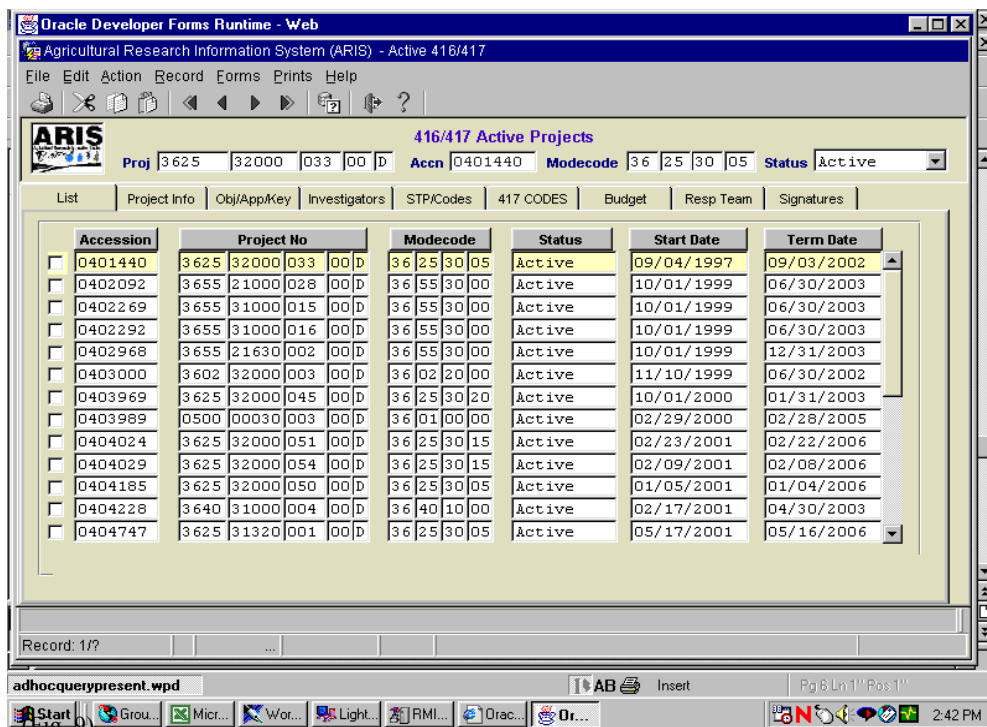
Searching Mode code 36 (MWA); Active (A), Inhouse (D) projects, with SOI 3410 (fig. 7). In order to see all of your criteria, click on the "Criteria List" tab and a screen will be displayed with all your chosen query criteria (fig. 8). You can do a print screen to keep for your records to do the same search in the future.
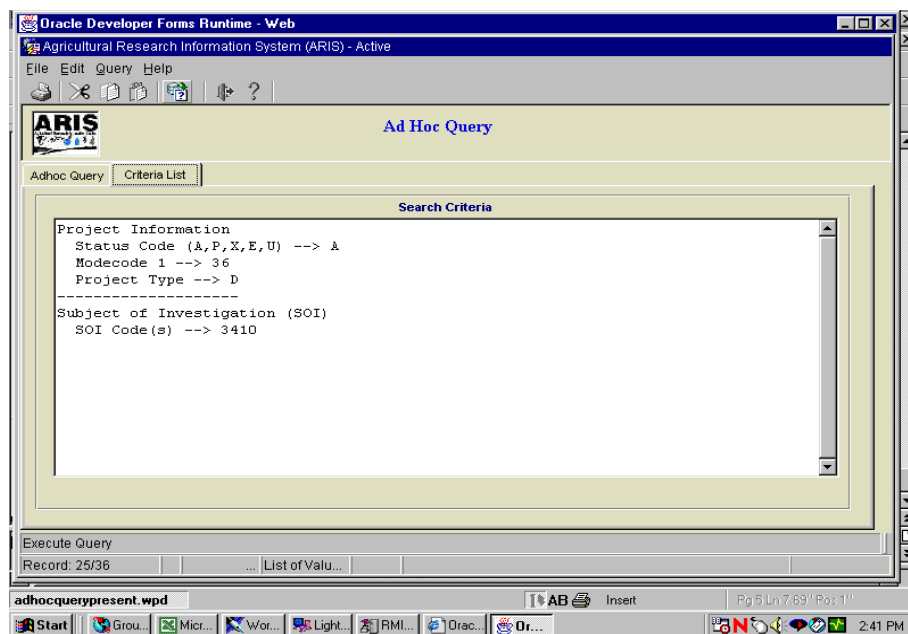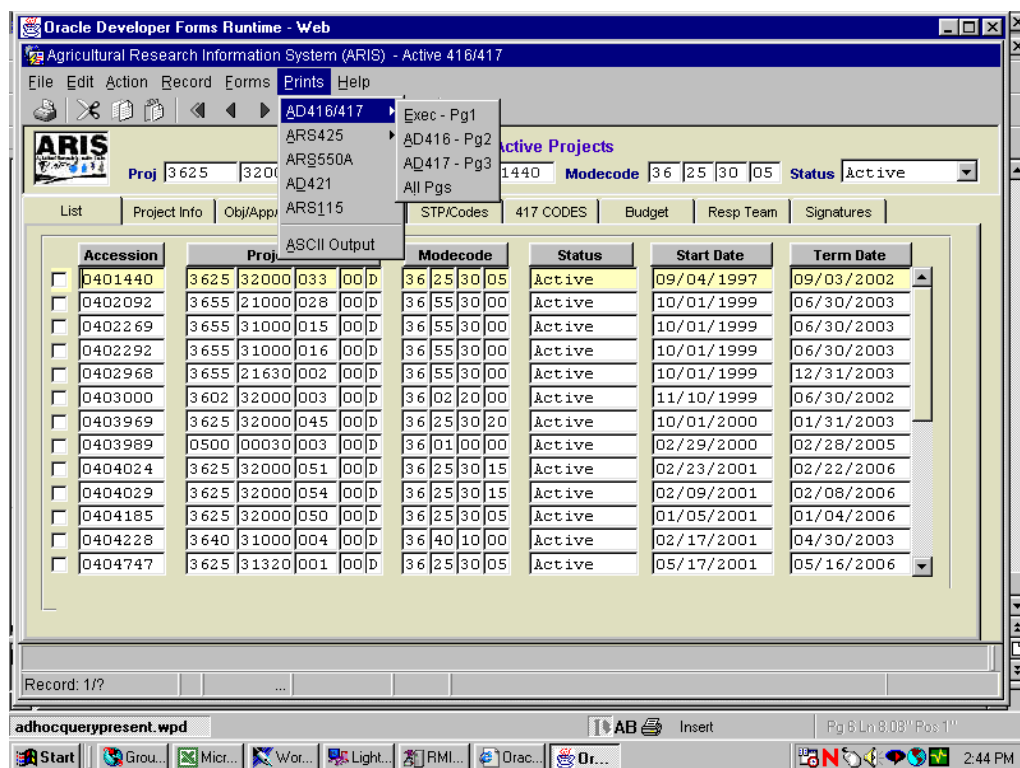

(Fig. 8)

(Fig. 9)

Once all your criteria have been entered, click on the Query button and the system will generate a listing of all the projects that meet the criteria (fig. 9).

(Fig. 10)

In order to view the projects, highlight the line to view, and click on the appropriate tab. In order to print the 416/417, etc., click on "Prints" from the toolbar and then choose the item to be printed (fig. 10). Adobe will automatically display the print file. Click on the Printer icon to print.

National Program Leader Report:

In order to query the system for all projects that a particular NPL is responsible for, you click on the Project Information main category, then Responsible Team. You enter L for Type if you want all the projects the NPL is Leader on, and their signature code. Then click on query (fig. 1).

You also need to make sure you enter "D" for inhouse project type and "A" for active projects or every kind of project and every status will be queried and displayed. These two options are no longer defaulted in the Ad hoc Query option, as they were in RMIS.

(Fig. 1)

The criteria listing is displayed below to show all the query values that were entered to obtain the listing (fig. 2).

16
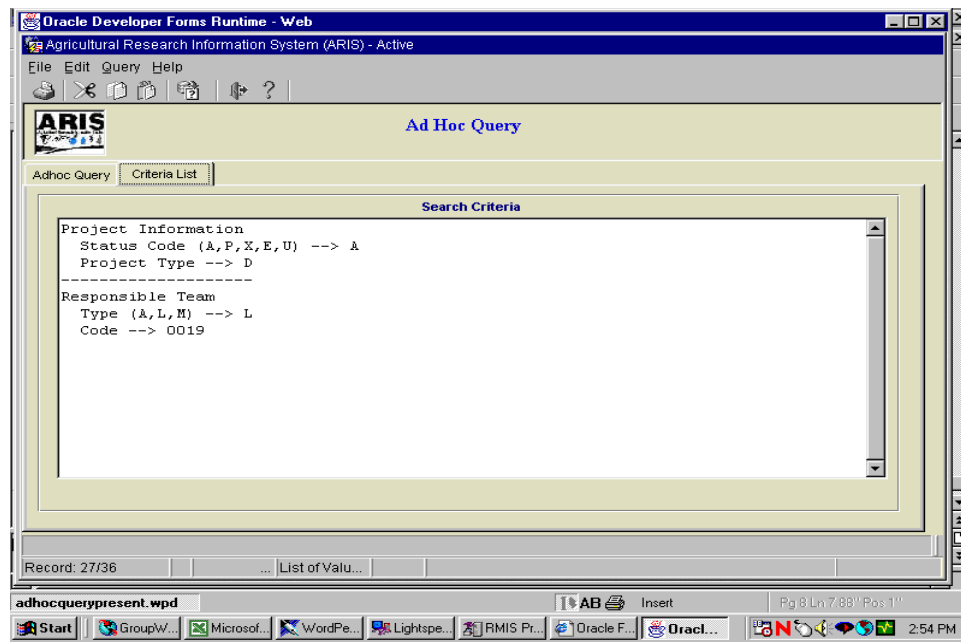
(Fig. 2)

Summary Reports

Summary Reports are "canned" reports, which means they cannot be modified in any way and are standard in format.   No querying is available. The options available include: Summary report by Agency or Locations within - SOI, Activity, Special, and STP; Summary by Location for SOI, Activity or Special; Summary of Responsibility in various combinations by ADA or NPL.

In order to retrieve a Summary Report, click on "reports" and then "Summary Reports" (fig. 1). The available options will be displayed. Click on the appropriate option and Adobe Acrobat will automatically display the report. The report can be viewed and/or printed. To print, click on the Printer icon.
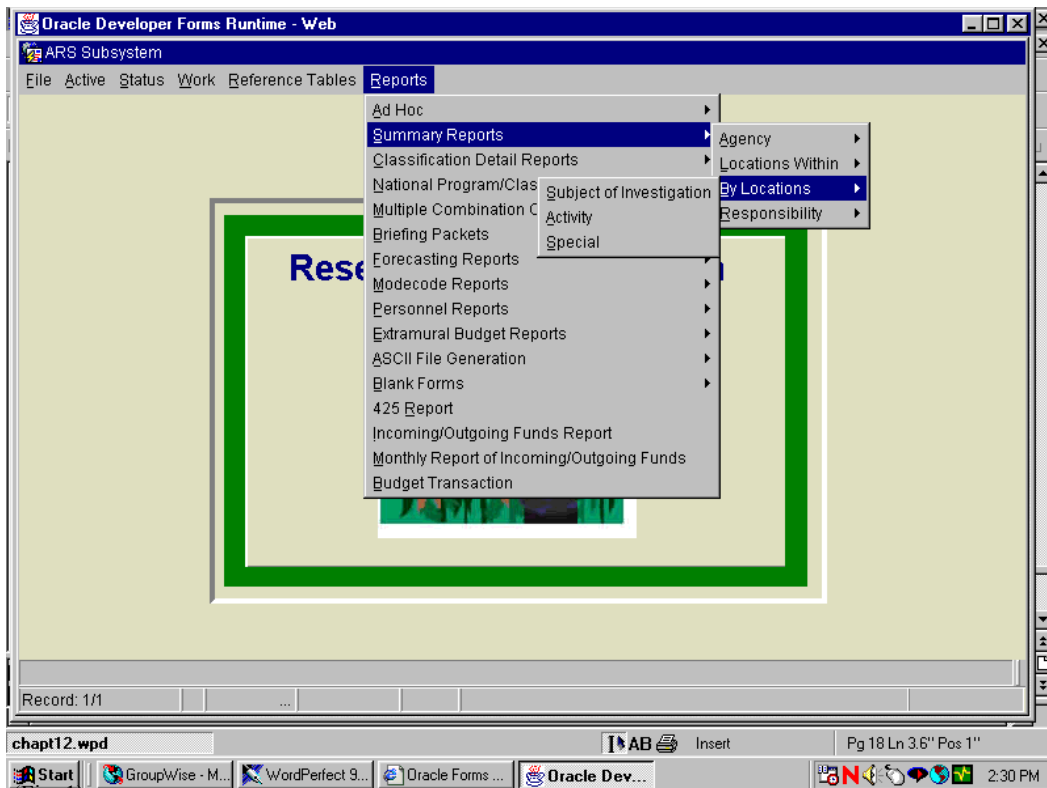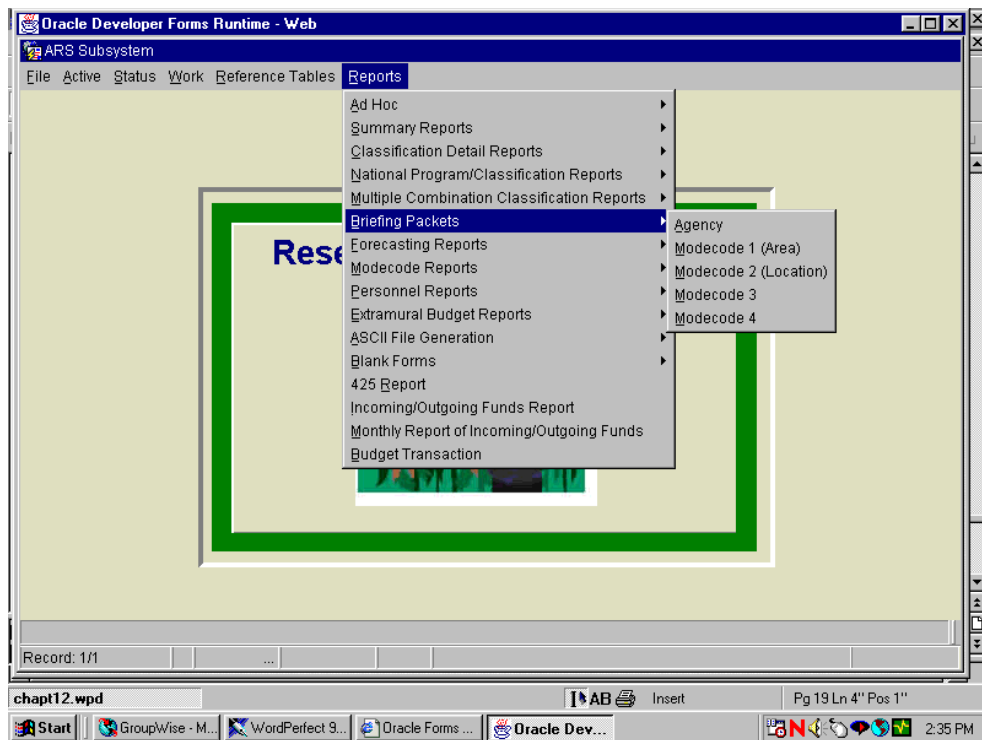

(Fig. 1)

Briefing Packet

The Briefing Packet report allows the user to obtain reports for the Agency, Area, Location, Centers or Management Units. No querying or customizing of reports is available within this option.

Briefing Packets are a good source of general information pertaining to a specific Management Unit, Location or Area. It is a good packet of information to have for site visits, briefings, or for giving new employees information about the Management Unit and/or Agency. Some of the information obtainable in these reports include: organizational listings, personnel information, inhouse projects, current year funding, breakouts of funding by SOI, and incoming and outgoing funding summaries, just to name a few.

In order to obtain a briefing packet, from the Research Documentation Screen, click on "reports" and then "Briefing Packets" (fig. 1).

(Fig. 1)

Determine which level report is required, and click on the appropriate option (fig. 2). (Ex. Location report for Poplarville MS - Mode code 6404.)
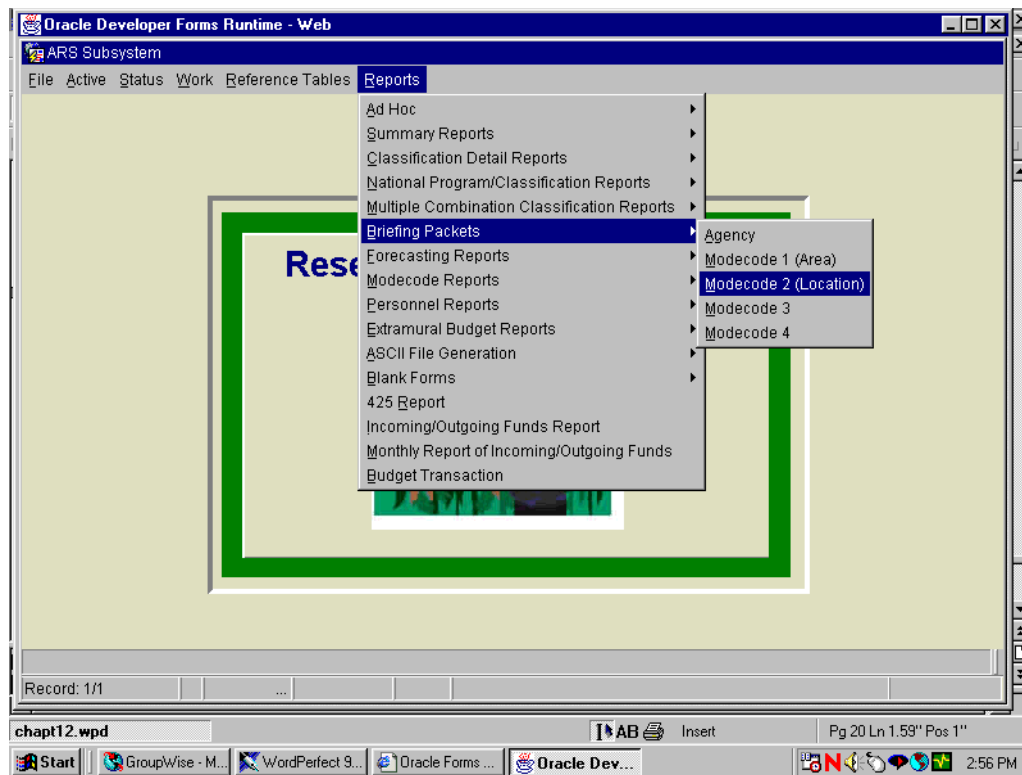
(Fig. 2)

The Briefing Packet options screen will be displayed (fig. 3). Enter the desired mode code by clicking on the "?" to display all the available mode codes. Scroll down the listing or search for the required code. Highlight the code and click on OK and the mode code will be inserted in the briefing packet screen. Then, mark the boxes for the required items that should be included in the report. Once all appropriate boxes are checked, click on the Run Report button at the bottom of the screen (fig. 3).

Adobe Acrobat will automatically display the report. To print, click on the Printer icon.

(Fig. 3)

Once the Briefing Packets are complete, click on the "Return" button to return to the Research Documentation screen.

General Helpful Information:

- When starting a new ad hoc query, it is best to use the "Clear Query" button at the bottom of the screen to ensure that all values are cleared.

- In large text fields, such as Objective or Approach, always use the % sign after typing in the value.

- The percent (%) sign takes the place of the question mark (?).

- Remember to enter the "D" for inhouse projects and "A" for active projects.

- For a range of values (for coding), use the colon (:) (example: BPMS097:BPMS099)

- For greater than or less than a certain value (percentage), use the colon. (example: national program codes with greater than 50%, enter as: 50:100).

- For more information on searching See Chapter 1 of the ARIS OnLine Manual.